

BUDGET MONTH-TWELVE

Your company is very happy with your work over the last 12 months. They have given you a bonus check for \$2000. You have decided to invest in bonds. Pick 4 to 5 bonds in which to invest.

Questions to be answered:

What is a savings bond? _____

What is a municipal bond? _____

What is a corporate bond? _____

Will you invest in junk bonds or investment grade bonds? Why? _____

What risks are associated with investing in bonds? _____

What rewards are associated with investing in bonds? _____

Type of Bond And Why You Like It	Borrower	Cost of Bond	Interest Rate of Bond	Maturation Period

Month-Twelve Ledger Sheet

Disposable Income and Bonus Check of \$2,000.00	Bond Purchases	Other Monthly Expenses (Apartment Rent, Insurance, Clothing, Gasoline, Entertainment, Food and Utilities, and, Car Payment and Insurance, Health and Life Insurance, 401-k Retirement Contribution)	Running Balance

How much do you have left for savings after Month-Twelve? _____

Mutual Fund Investments From Lesson 8

Mutual Fund	Purchase Price	Current Price	Money Earned Toward Retirement